

Directions: Please complete shaded areas below.

Department Name: PARK AND RECREATION

Project Name: CADD FILE MANAGEMENT SYSTEM

Project Amount: \$282,000 (\$82,000 encumbered FY 05; \$200,000 unfunded)

Preparer Name & Contact Information: CONNIE SCHEEL (305) 755-7941 cscheel@miamidade.gov

Project Type: Please check (✓) one.

☐ Enterprise ☒ Communities of Interest ☐ Department Specific

Funding Source: Please check (✓) one.

☒ GF Capital ☐ Proprietary Capital

☐ **Mandated Requirement**
(If checked (✓), please indicate who is mandating this request as well as the time frame)

☐ **4 Department Priority of Initiative (1, 2, 3, etc.)**

Section A

Background:

Provide any relevant background information to include existing investments in the proposed project. If applicable, please include any information explaining why this is a mandated project.

Park and Recreation actively utilizes CADD software for its numerous facilities—existing, under construction and planned. Parks' engineers, architects, landscape architects and outside consultants have created thousands of drawings for Parks' many facilities and there will be many more created with the upcoming GOB initiatives. Additionally the department has several thousand paper engineering drawings, some of which are beginning to experience deterioration.

Due to lack of a cohesive file management policy based on best practices, the department's extensive library of electronic drawings have been inefficiently scattered across several folders on a file server. Interdependencies among files lend another layer of complexity as moving or deleting a parent drawing will result in a child drawing that no longer works. In many cases CADD and non-CADD files have been commingled, making maintenance of appropriate security levels to protect these critical files almost impossible.

Parks also has several thousand paper engineering drawings, some of which are beginning to experience deterioration. These drawings are irreplaceable, and if destroyed, would be forever lost. In addition to drawings that were created manually before the department started using CADD, there are electronically generated drawings with valuable annotations from engineers and inspectors. While the department takes prudent steps to protect these original documents, they are vulnerable to loss by fire or other catastrophic event with no way to recover or restore them.

Although the department has a full-time records management specialist to keep paper engineering drawings organized, getting a copy of one entails staff waiting time while a requested document is located, retrieved and reproduced. For either electronic or paper documents improperly filed, the inability to locate (quickly or at all) required information is a productivity drain on the department.

The department has encumbered \$82,000 to organize its electronic drawings, update internal procedures and teach best practices to Parks CADD staff. This project is in process. However, it does not have the funding required to scan the paper documents and convert them into electronic format.

Problem Statement:

Define the problem, need, or opportunity.

Parks needs to complete the process of organizing its electronic engineering drawings and then digitize its paper drawings and incorporate them with CADD generated files. With GOB projects just around the corner, the departments work load of construction projects (and resulting engineering drawings) will increase dramatically. Parks has a very short window in which to prepare for the many pending GOB projects and ensure that it has the proper procedures in place to manage the volume of new activity.

Solution:

What is the proposed solution?

- 1) Finish the organization of the electronic files, adopt new file management procedures, and provide user training to ensure they are proper implementation of these procedures and industry best practices.
- 2) Obtain the services of a backfile conversion service to scan and digitize the department's paper engineering drawings. Incorporate the additional documents into the file structure for existing CADD files so that all engineering drawings for each facility are together and easy to locate.

Expected Benefits / Direct Payback:

State the benefits of solving the problem or reaching the goal. Hints: "How the project will reduce costs (perhaps from reducing redundant tasks such as data entry), better decision making at each step of a process (perhaps due to more accurate and timely information), or improved efficiency (thanks to fewer steps to process a transaction).

Specify collective benefits and identify benefits that are specific to each stakeholder. Wherever there are metrics (numbers or targets) for improvement, be sure to include them. Examples: "Reduce communications costs by 20%" or "Increase revenues by \$1,340,500 in fiscal year 2007.

Benefits to the department from completion of both parts of the project include the following:

- 1) Protection of irreplaceable paper documents.
- 2) Reduction of the amount of rework required to recreate a lost or misplaced survey or drawing.
- 3) Improved ability to resolve issues of code compliance or disputed permits with the building

department, contractors and consultants

- 4) Work time saved by being able to immediately access all engineering drawings electronically no matter their source or how created
- 5) Productivity gains to be realized by assigning the records management specialist to higher value activities.
- 6) Improved relationships with contractors, consultants and other MDC departments through improved access time to needed engineering drawings.

Directions: Please complete shaded areas below.

Department Name: PARK AND RECREATION

Project Name: PARKS' EDMS IMPLEMENTATION

Project Amount: \$625,000

Preparer Name & Contact Information: CONNIE SCHEEL (305) 755-7941 cscheel@miamidade.gov

Project Type: Please check (✓) one.



Enterprise



Communities of Interest



Department Specific

Funding Source: Please check (✓) one.



GF Capital



Proprietary Capital



Mandated Requirement

(If checked (✓), please indicate who is mandating this request as well as the time frame)



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Department Priority of Initiative (1, 2, 3, etc.)

Section A

Background:

Provide any relevant background information to include existing investments in the proposed project. If applicable, please include any information explaining why this is a mandated project.

Park and Recreation maintains paper records at its Hickman Building administrative offices, its regional offices and individual park sites. (These are over and above the engineering drawings that are discussed in a separate business case.) At the Hickman Building, there are rooms devoted to file storage. In addition, there is document storage at Kendall Warehouse for non-current files that must still be retained.

Problem Statement:

Define the problem, need, or opportunity.

In order to conserve space and improve access to information, the department needs to digitize its paper archives. In order to improve efficiency, the department needs to implement EDMS workflow and document retrieval for both its paper and electronic documents. The county has a proven enterprise EDMS solution. Park and Recreation would like to implement this solution to increase efficiencies with workflow, gain the benefits of efficient document storage and retrieval, and free up physical space.

Solution:

What is the proposed solution?

Engage the services of a documents management specialist along with an ETSD analyst to perform a business analysis of Parks' document management practices and needs. Deliverables expected from this analysis will include recommendations to improve on its current practices, a suggested cataloging schema, determination of the amount of DASD required, and recommendations for workflow configuration and scanning solutions. After internal signoff on these recommendations, contract the scanning of non-sensitive documents to an outside vendor and obtain (purchase and/or lease) scanning equipment so Parks' personnel can scan sensitive items in-house. Obtain the assistance of ETSD staff to train Parks' staff and/or contract employees in proper cataloguing procedures to place electronic files into the EDMS repository, document the cataloguing system, and train Parks' users in how to use it to efficiently retrieve information.

Expected Benefits / Direct Payback:

State the benefits of solving the problem or reaching the goal. Hints: "How the project will reduce costs (perhaps from reducing redundant tasks such as data entry), better decision making at each step of a process (perhaps due to more accurate and timely information), or improved efficiency (thanks to fewer steps to process a transaction).

Specify collective benefits and identify benefits that are specific to each stakeholder. Wherever there are metrics (numbers or targets) for improvement, be sure to include them. Examples: "Reduce communications costs by 20%" or "Increase revenues by \$1,340,500 in fiscal year 2007.

Having needed information readily available with EDMS will enable Parks' staff to quickly find information they need rather than to have to wait for clerical staff to search and try to find it. Having workflow means that documents can be automatically routed for action or approval instead of being manually passed from secretary to secretary for processing. These two benefits alone will make Parks' staff more efficient and effective in their work. Additionally, by digitizing the paper archives, additional space can be freed up to support departmental activities.